

Institutionalization of UX

An Object Oriented Approach



Human Factors International, Inc.

We Help Make Companies User-Centric



Prepared by:


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CEO and Head of HFI Laboratories

January 16, 2014





Over 15 Years of Institutionalization Work

 Human Factors International

The Institutionalization of Usability

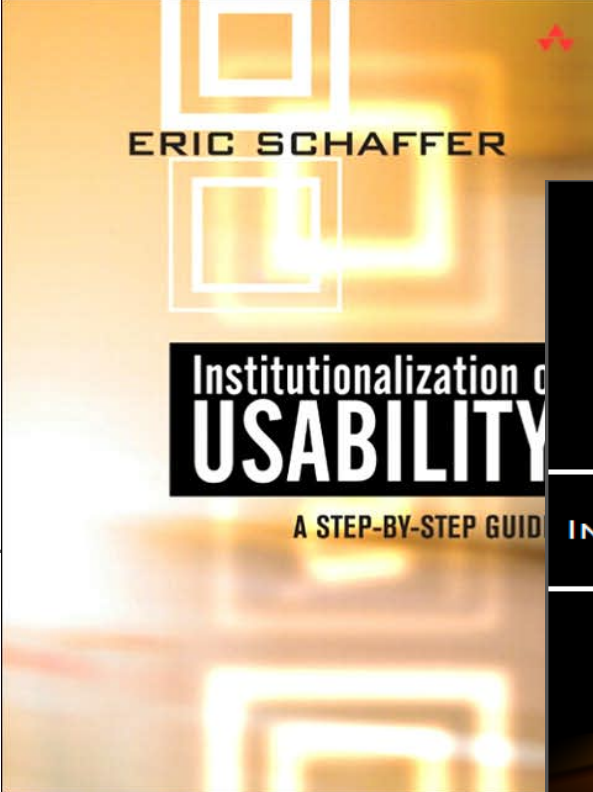
White paper

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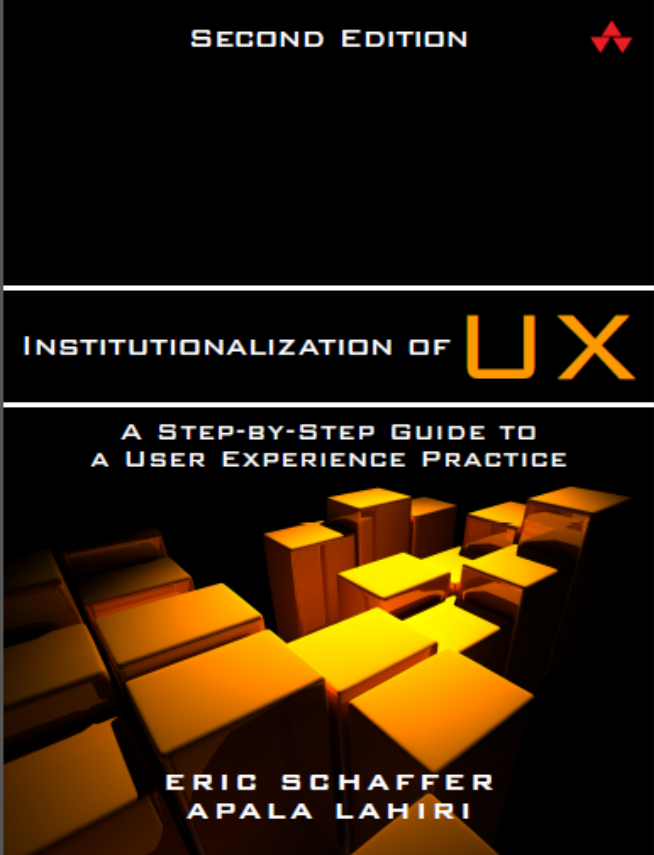


ERIC SCHAFFER

**Institutionalization of
USABILITY**

A STEP-BY-STEP GUIDE

Published 2004



SECOND EDITION

INSTITUTIONALIZATION OF **UX**

A STEP-BY-STEP GUIDE TO
A USER EXPERIENCE PRACTICE

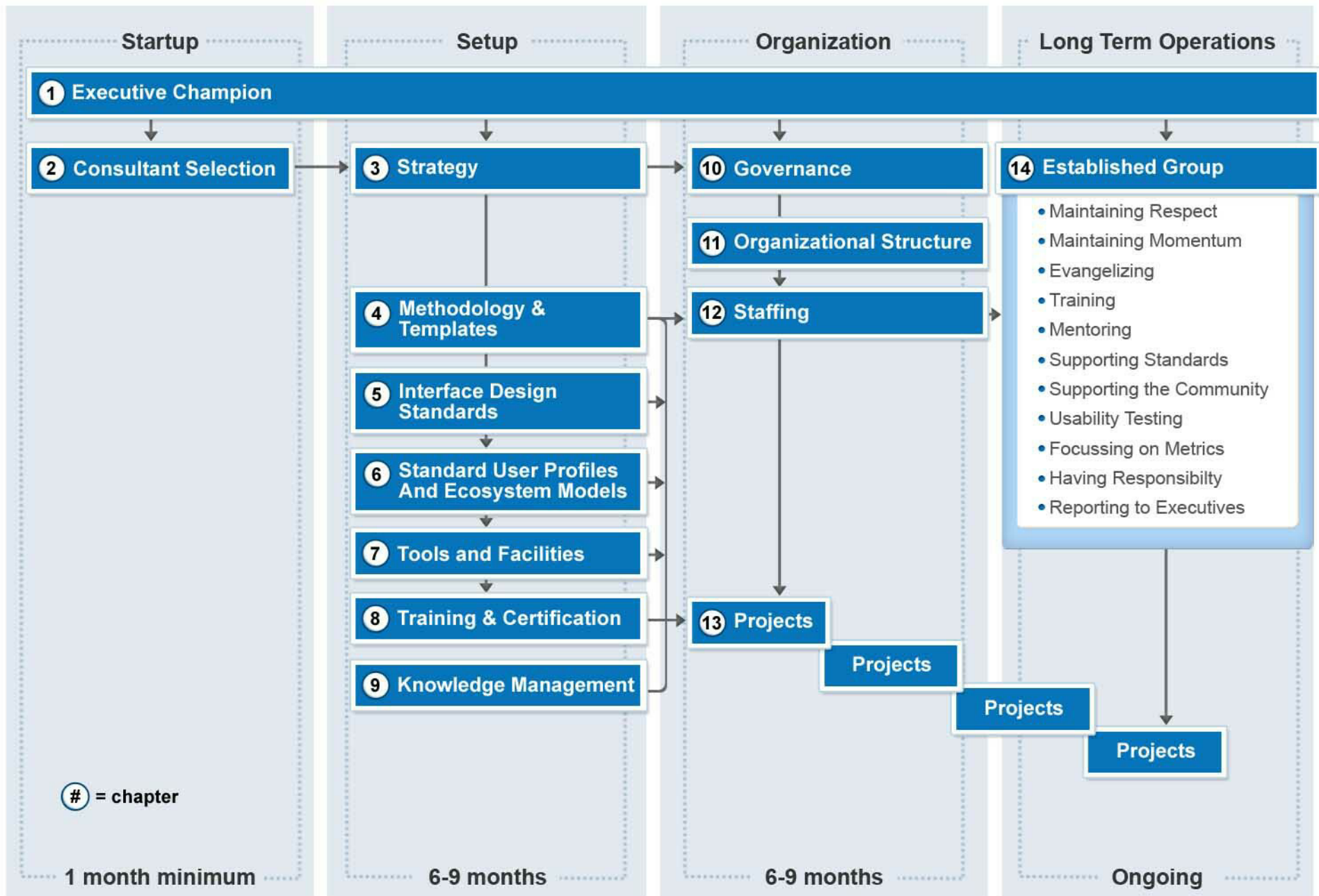
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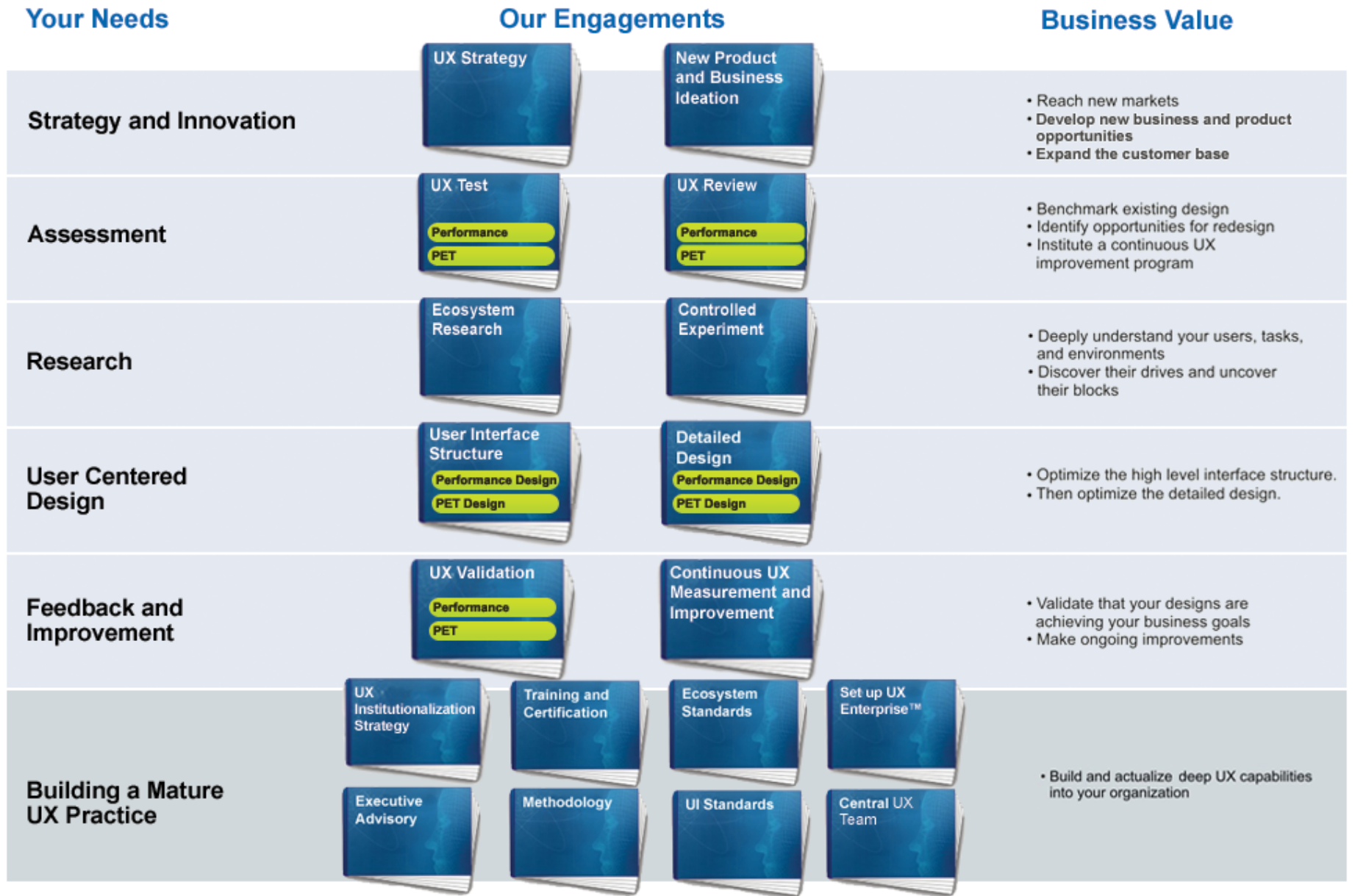
Published 2014



Institutionalization of a User Experience Practice

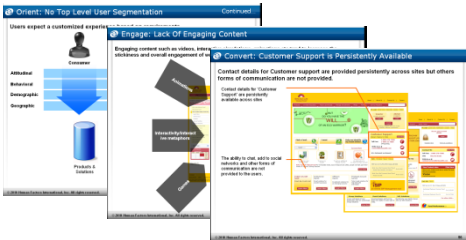
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CEO



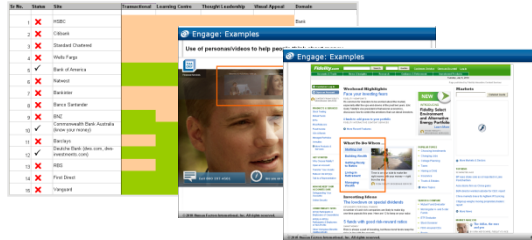


PET = Persuasion, Emotion, and Trust

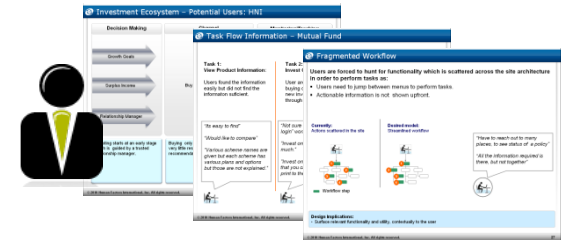
The Process...



Expert Review

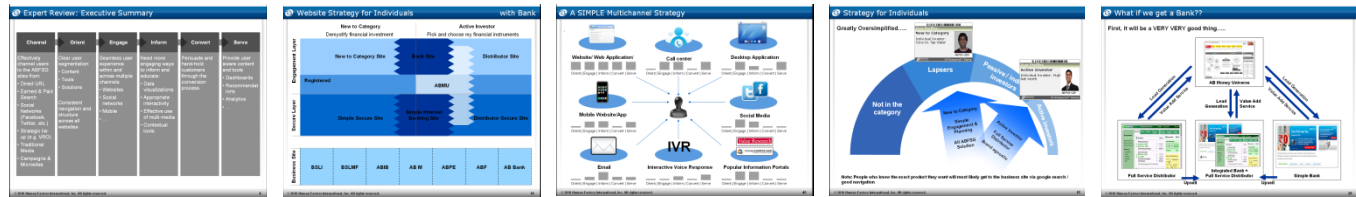


Competitive Review

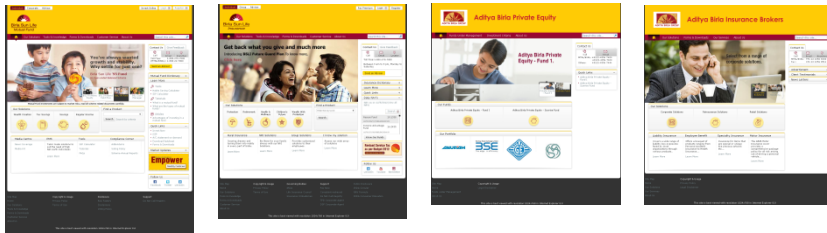


User Research

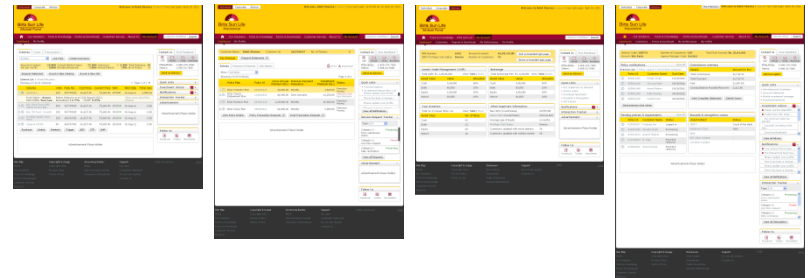
Digital Strategy



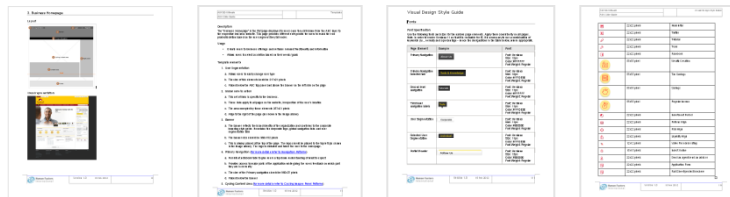
Unsecure Site



Secure Site

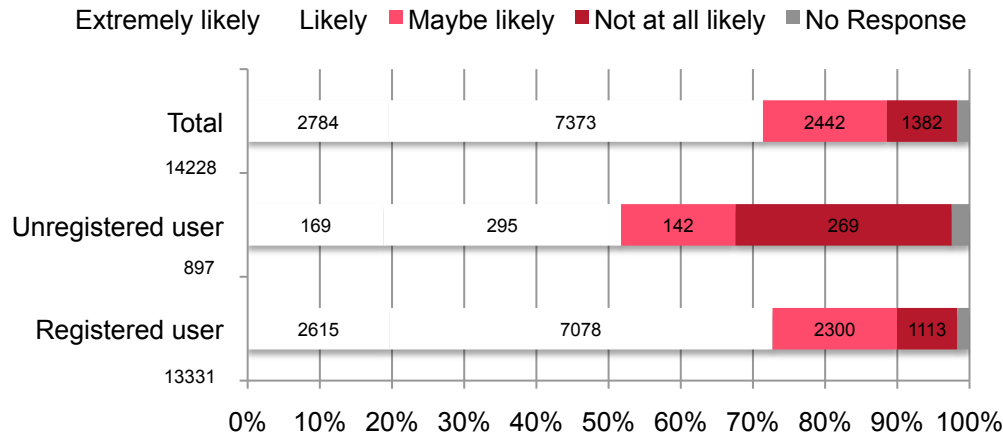


Standards



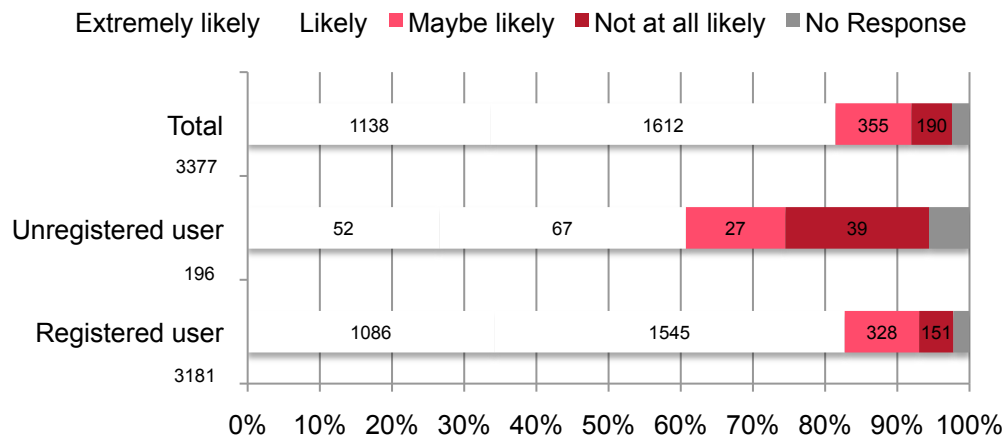
Likelihood of recommending the site to a friend or colleague

Life Insurance



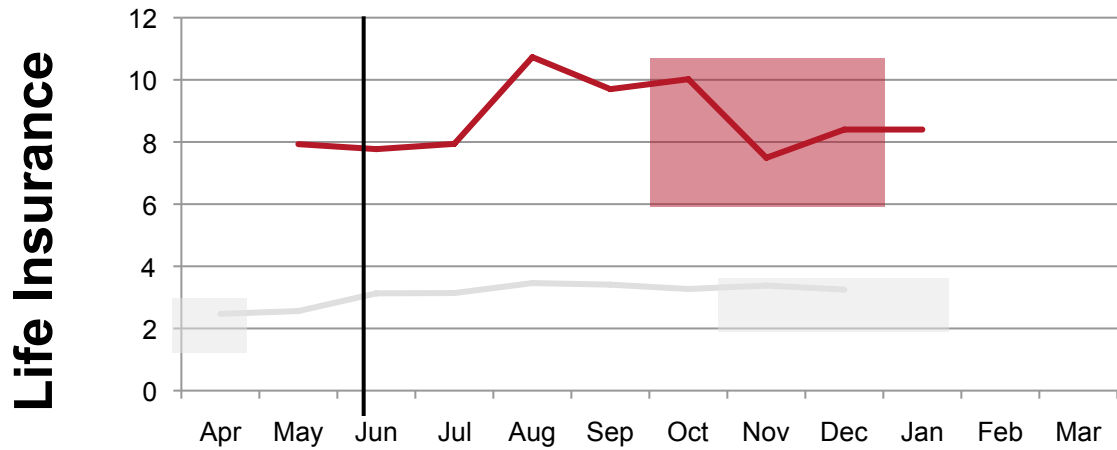
72% are Likely or Extremely Likely to recommend to a friend or colleague

Mutual Fund



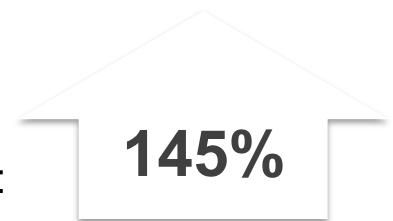
81% are Likely or Extremely Likely to recommend to a friend or colleague

This metric measures the amount of time customers are spending on your site per visit. A higher number indicates that users are spending more time on the site and hence are more engaged

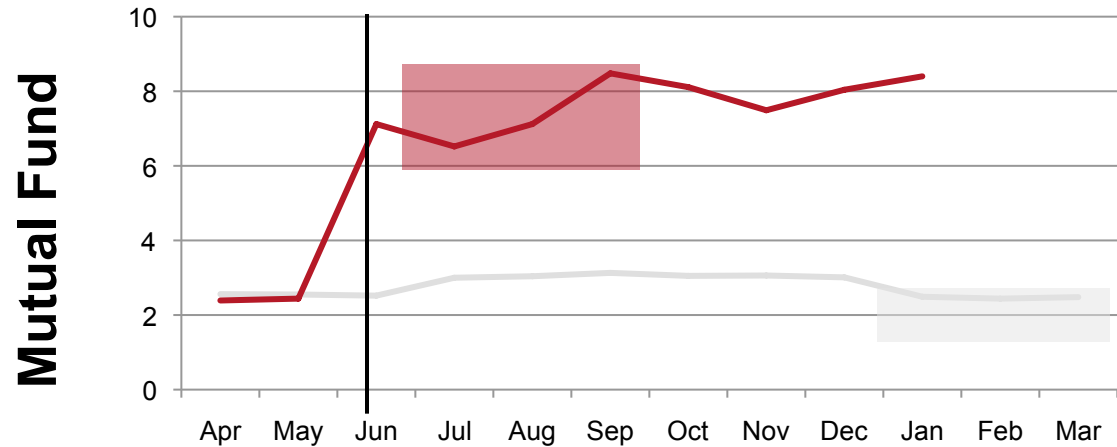


Pre Launch:
3.60

Post Launch:
8.81

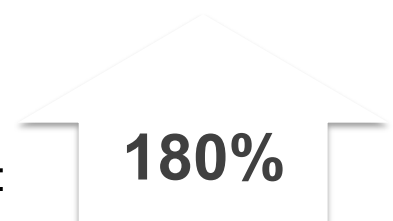


— Apr 2011 to Mar 2012
— Apr 2012 to Jan 2013

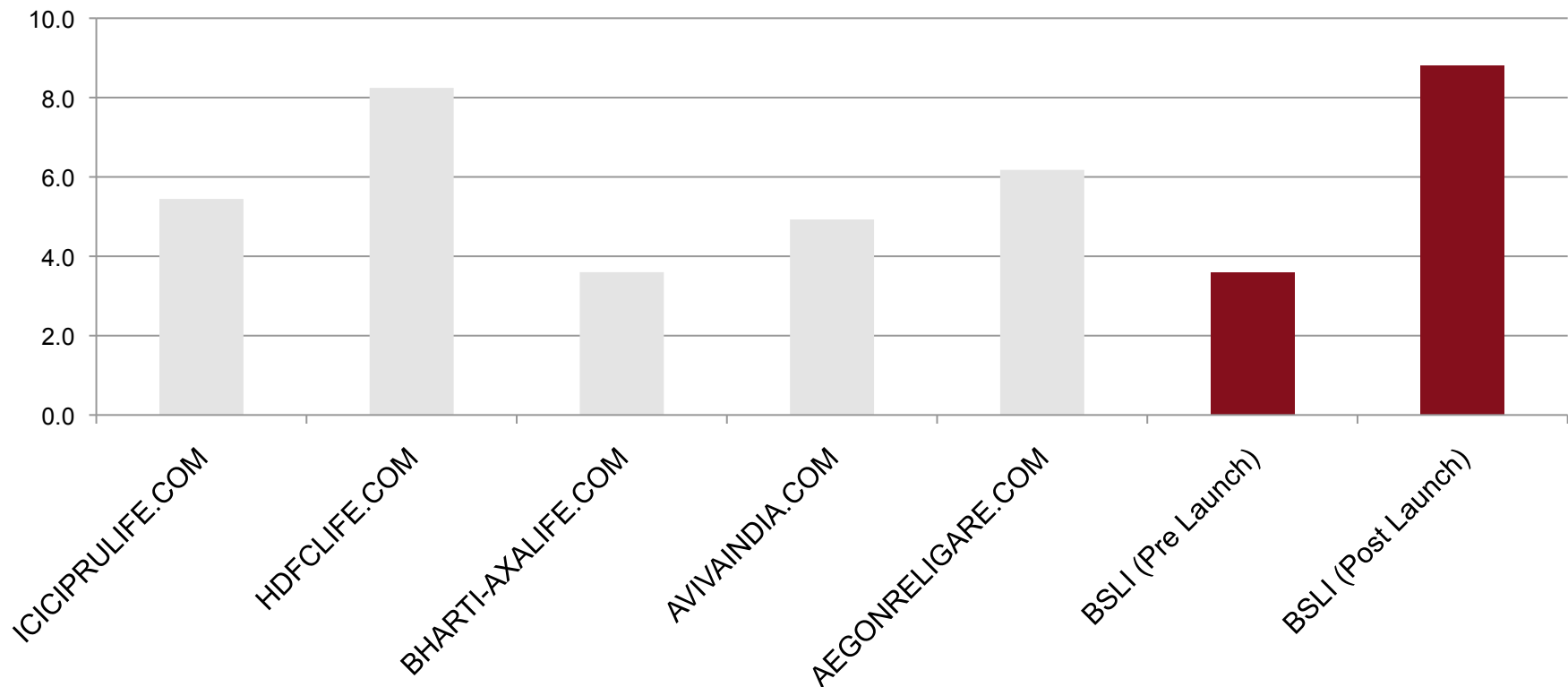


Pre Launch:
2.73

Post Launch:
7.66



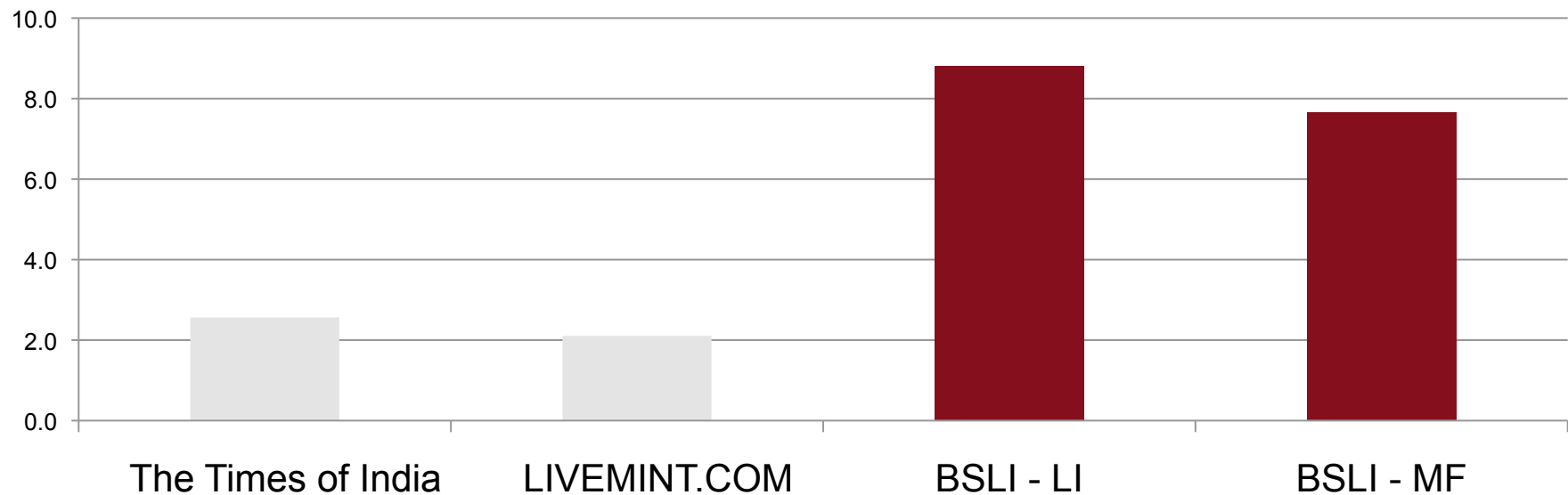
Time Spent / Visit – Comparison with other LI Websites



Post Launch of the new website, BSLI moved from last to the top position

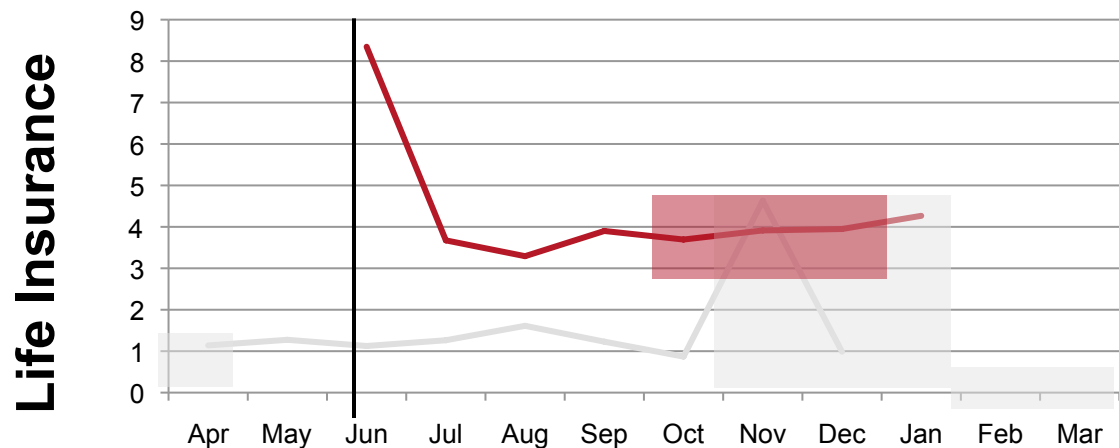
Data Source: comScore – Global leader in measuring the digital world and the preferred source of digital marketing intelligency

Time Spent / Visit - Comparison with other Content Heavy Sites



Data Source: comScore – Global leader in measuring the digital world and the preferred source of digital marketing intelligency

The number of leads generated (Contact Us) for every 1000 unique visitors to the site. A higher number indicates that more users are converting (Contacting Us)

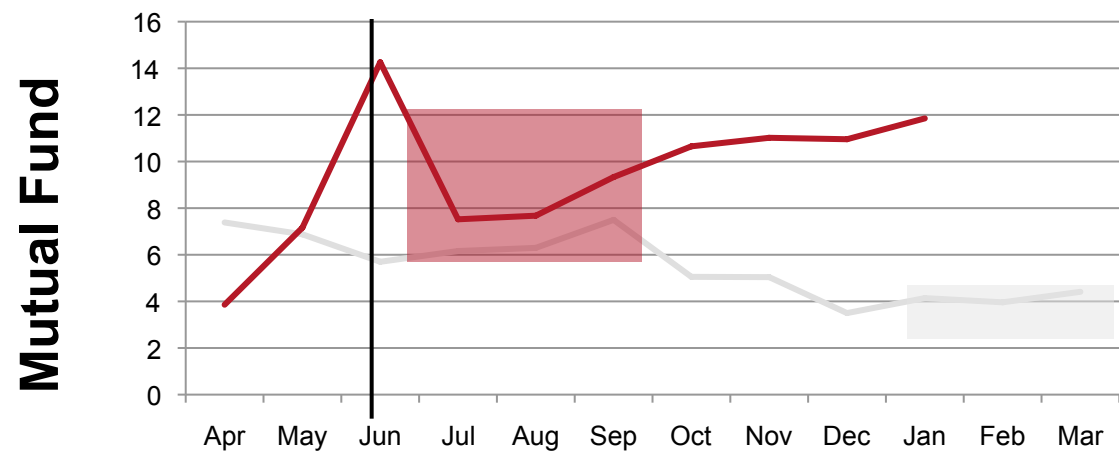


Pre Launch:
1.57

Post Launch:
4.38

179%

— Apr 2011 to Mar 2012
— Apr 2012 to Jan 2013



Pre Launch:
5.50

Post Launch:
10.41

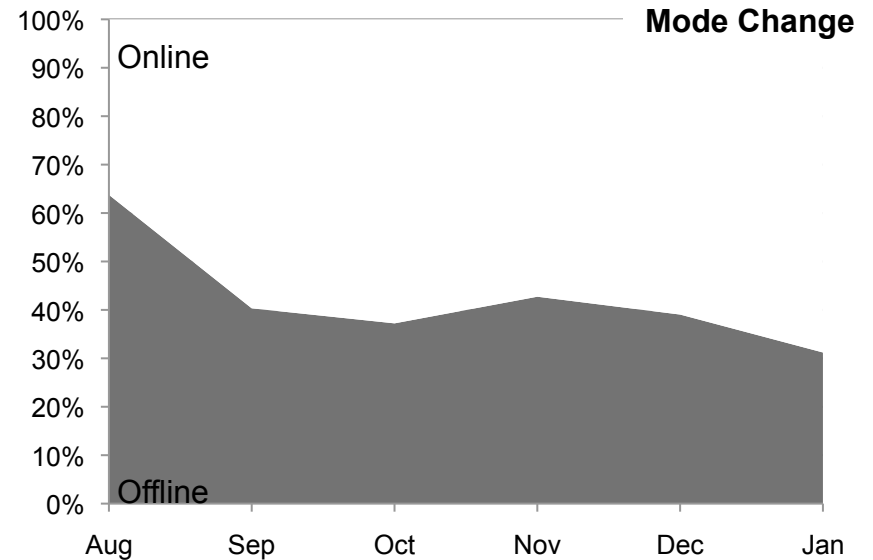
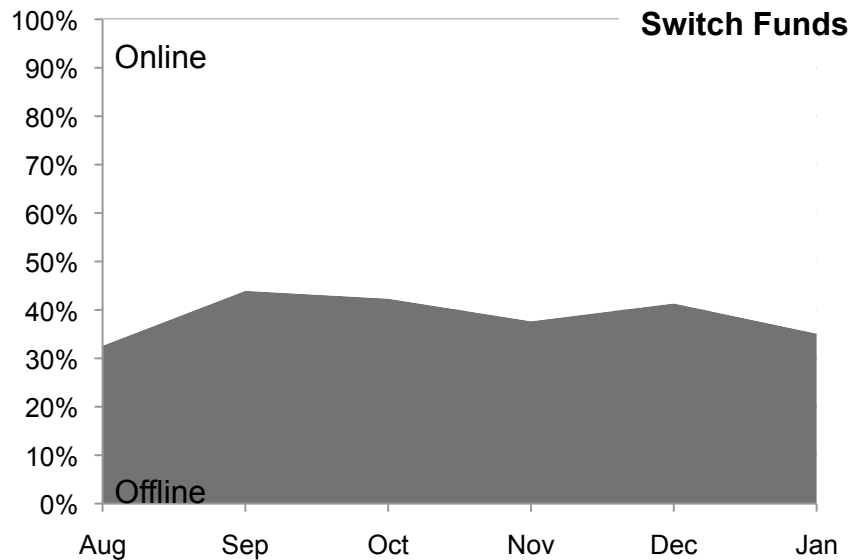
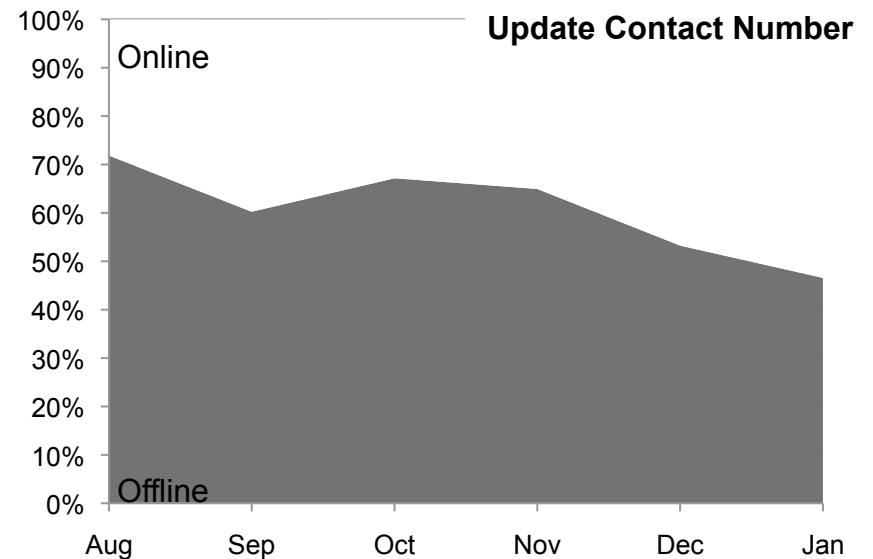
89%

Migrating to Online – Life Insurance

This metric represents the ration of key tasks performed online vs. offline.

The goal is to increase the percentage of user coming to the online channels versus the offline channels

Since launch, LI has seen a steady migration of key transactions from Offline to Online



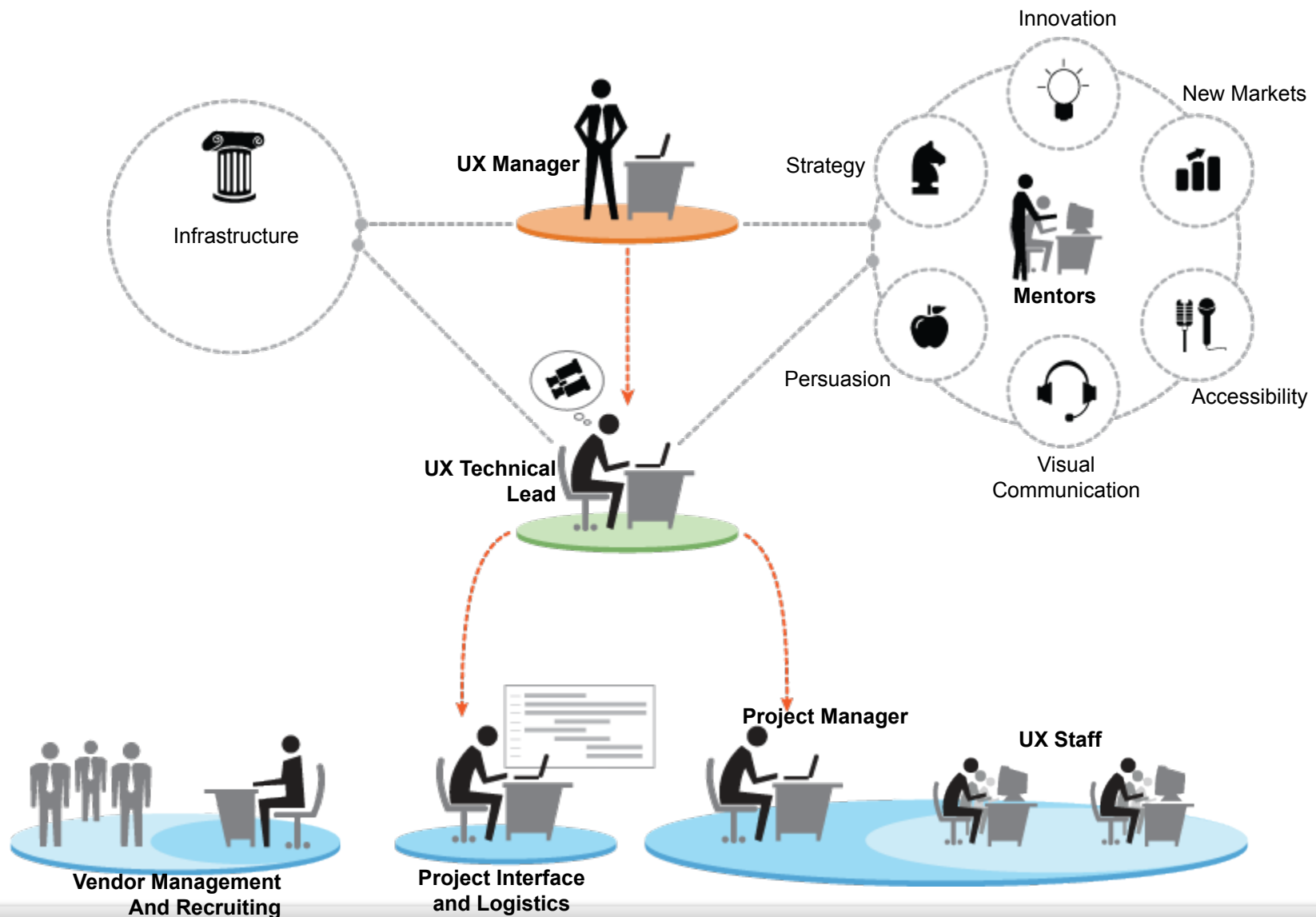
The Result of Multichannel Silos

The screenshot shows a navigation menu for a banking website. The menu is organized into two columns. The left column contains main navigation items, and the right column contains sub-items. Several sub-items are circled in red, indicating a focus on these specific areas. The items circled in red are: Internet banking, Cellphone banking, Telephone banking, Speech banking, .mobi, and Internet access. The menu also includes a search bar at the top left and a breadcrumb trail at the top right.

Main Navigation Item	Sub-item
Self-service banking	Introduction
Tools and calculators	Internet banking
Products and services	Cellphone banking
Packaged solutions	Telephone banking
Apply online	Speech banking
Fees, rates and prices	AutoBank
Banking regulation	.mobi
Delighted or disappointed	Online Share Trading
Contact us	Internet access
Branch locator	Pre-paid services
Site A-Z	AutoPay
Home page	Business Online
	Electronic banking agreement
	Self-service banking profile

Once you are banking online you c

This organizational structure should support corporate wide user centricity.



Certified Usability Analyst™ (CUA) Certification Program**User-Centered Analysis and Conceptual Design**

1. Introduction to UCA
2. Creating a Design Strategy
3. Profiles and Personas
4. Field Studies
5. Complementary Data Gathering Methods
6. Scenario and Task Analysis
7. Primary Noun Architecture
8. Information Architecture
9. Getting Ready for Detailed Design

Practical Usability Testing

1. Introduction
2. Designing a Usability Test
3. Early Prototype Testing
4. Advanced Prototype Testing
5. Analysis and Reporting
6. Remote Testing
7. Comparative Studies
8. Live Site Analysis
9. Refining your Technique
10. Ten-Point Usability Checklist

The Science and Art of Effective Web and Application Design

1. Design is Science and Art
2. Navigation
3. Presentation
4. Content
5. Interaction
6. Website and Application Prototyping
7. Accessibility
8. Internationalization
9. Beyond Design Knowledge

Putting Research into Practice

1. Introduction
2. Memory
3. Cognitive Processes
4. Audio / Visual Processing
5. Design and Usability Methods
6. E-commerce and E-service
7. Emotional Design
8. Age Effects
9. Internet Usage

Certified User Experience Analyst™ (CXA) Certification Program**How to Support Institutionalization of a Mature UX Practice**

1. Working in a Level V Practice
2. Assessment and Certification
3. Executive Championship
4. Governance
5. Culture
6. Organizational Structure
7. Staffing
8. Training and Certification
9. Enterprise Software
10. Methods, Tools, and Templates
11. Standard Projects
12. UI Standards
13. Knowledge Management
14. Facilities

How to Design for Persuasion, Emotion, and Trust (PET design)

1. Introduction: The Persuasion Quest
2. Designing for Trust
3. Emotional Design
4. Persuasion Design
5. Overview of HFI's PET design process
6. PET-Focused Personas and Scenarios
7. Initial Assessment Methods
8. User Research Methods
9. PET design Strategy
10. Validation Methods

How to Design for the Big: User-Centric Innovation and Strategy

1. Stakeholder Envisioning
2. Megatrends and Lifestyles
3. Usage and Design Trends
4. Business and Product Strategies
5. Ethnography
6. Assessing the Competition
7. Big Insights, Methods and Opportunities
8. Executive Intent
9. Market and Channel Strategies
10. Ideation
11. Evaluation
12. Concept Validation and Testing

The PET Architect

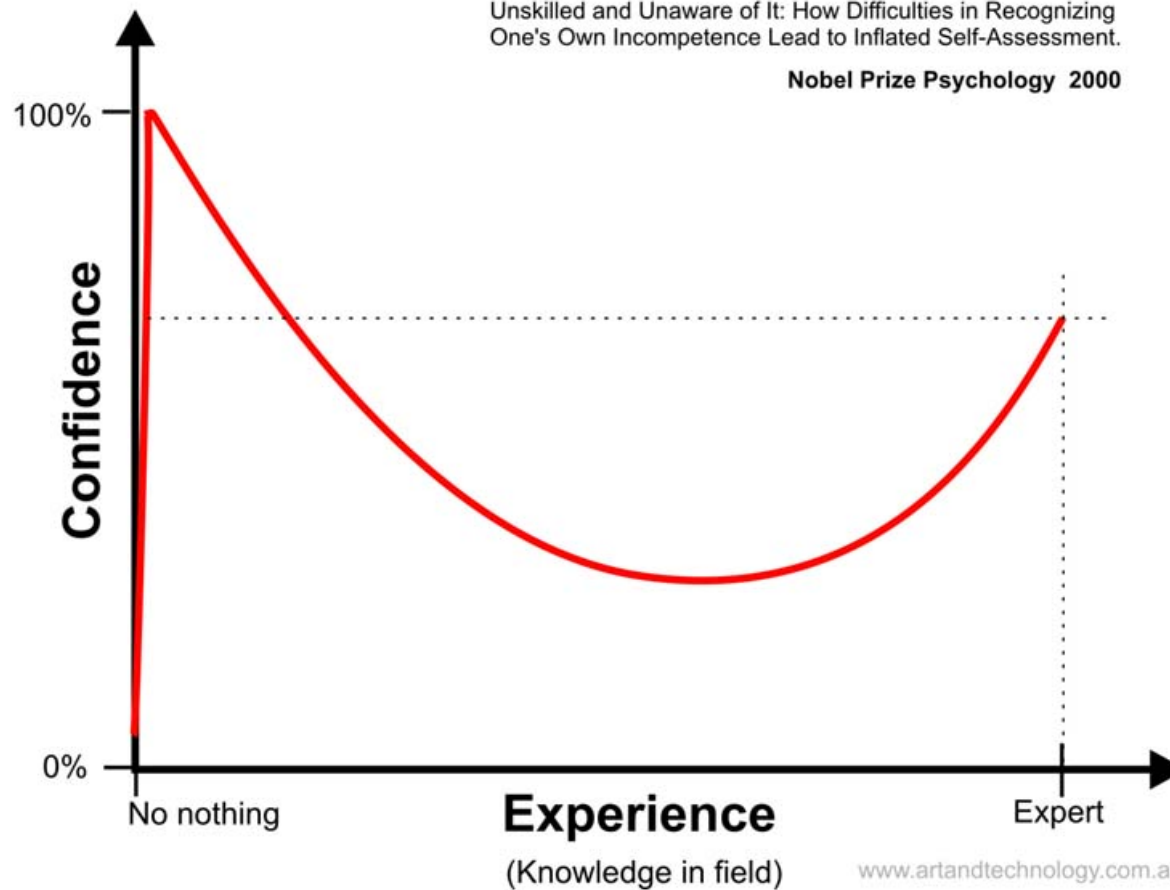
1. The Cost of Persuasion Vacuum and Persuasion Clutter
2. The PET Difference
3. Your Job as PET Architect
4. Fit into Your SDLC
5. Listening for the Core PET Meme
6. A Solid Foundation for Design
7. Deriving a Core PET Meme
8. Presentation and Evaluation
9. Unfolding Through Time
10. Creating a Core Persuasion Flow
11. Adding Resonant Triggers
12. Customer Retention
13. Strategy
14. Innovation
15. Site or Application Design

Educate Educate Educate

Dunning-Kruger Effect

Unskilled and Unaware of It: How Difficulties in Recognizing One's Own Incompetence Lead to Inflated Self-Assessment.

Nobel Prize Psychology 2000



Online or Train the Trainer

Essentials of Usability

An Overview of Usability Imperatives and Methods

Self-Paced Course on User-Centered Design (UCD)

3 reasons why your company should have this course

1. Create a company-wide appreciation and understanding of User-Centered Design

What it is

The Essentials of Usability course is a self-paced overview of the fundamentals of User-Centered Design. It is an excellent way for a company to bring the basic knowledge of usability to a wide audience within the organization at minimal cost. This course will allow you to give everyone in your organization a heightened awareness of usability.

Who it's for

This Usability 101 course is for people who work with and support the User Experience (UX) team, including designers, developers, marketers, strategy and innovation people. It will give them a better understanding of their UX